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Wealthtech Weekly

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Reporter

In the latest edition of "Ask an Advisor," I dove into a polarizing question: How much technology should you show clients? The answers varied widely, from advisors who prefer total transparency to those who keep it all behind a figurative curtain.

Speaking of questions: I'm now fielding queries for the "Ask an Advisor" series on practice management, retirement, taxes and more — and I want to hear from you. Email me — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

Ask an Advisor: How much tech should clients see?

Advisors spend a lot of time choosing the tools they use, and tech is more sophisticated than ever. But how much tech should clients actually see?

- **Michael Kitces' new AdvisorEconomics brings benchmarking to firms**
  The new business intelligence service uses several key performance indicators to help advisors decide how to best manage their talent and resources.

- **The missing piece in most advisor succession plans**
  Many advisors haven't yet begun putting together an exit plan. Experts say there are common features and defined timelines that can help make it work.
- **How advisors can avoid their 'biggest blind spot'**
  Advisors know that a transition plan is important, but many fall into the trap of procrastination.
- **CFP Board names new CEO, replacing retiring, longtime leader**
  K. Dane Snowden initially joined the CFP Board as chief operating officer in 2023 and replaces outgoing CEO Kevin Keller.

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